

## CDBG - How to Enter an Amendment

**Browser:** Log into AmpliFund, <https://ne.amplifund.com> using Google Chrome, Mozilla Firefox, or Microsoft Edge.

### Eligible Amendment Types

Before submitting an amendment, you will need to select a type. See below for the eligible and ineligible amendment types for your program.

**NOTE:** If an amendment type is submitted that is not eligible, the amendment will be rejected.

Types of Amendments accepted for Federal Programs (CDBG):

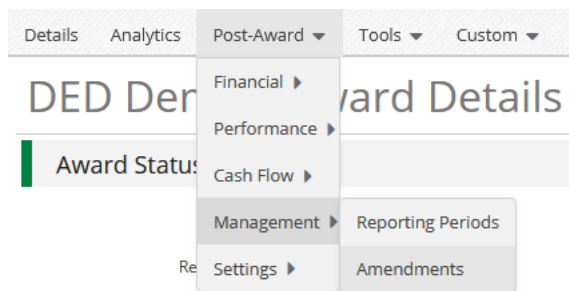
- Award Duration
- Category Budget
- Performance Goal (use for Beneficiary and Program Guidelines amendments, see additional information below)

Types of Amendments not accepted Federal Programs (CDBG):

- Awarded Amount

### Navigating to Amendments

1. Login into AmpliFund > Grant Management (left navigation) > Grants > [Choose Your Grant] > Post-Award (tab) > Management > Amendments



This page will show you all previously saved and submitted Amendments as well.

2. Click on the Amendment Name for a summary popup.
3. Click on the Magnifying Glass (in the same row as the Amendment Name) to view the entire Amendment.



4. If you had a saved or unsubmitted Amendment, you could click the **Pencil icon** to continue to complete it, or the **trashcan icon** to delete it.



### Creating an Amendment

5. When you have navigated to the Amendment page, click the **+** icon in the top right of the screen.



**NOTE:** The 4 types of Amendments are shown at the top of this creation screen. Not all programs will allow (approve) every type. Those Amendment types will be rejected. See the '[Eligible Amendment Types](#)' list above.

6. Select 1 or more Amendment Types you wish to use.
  - a. To select an Amendment Type, click on the circle.
  - b. To unselect an Amendment Type, re-click on the circle. (There must be at least 1 Amendment Type selected at all times).

Amendments

## Amendment

Award Duration ☐ Awarded Amount ☐ Category Budget ☒ Performance Goal ☒

7. After selecting 1 or more Amendment Type, click on the left side of the green button to see the Amendment screen for the type of Amendment you wish to complete. If you select more than one Amendment Type, make sure you click on the left side of each Amendment Type to toggle between the different screens.

Amendments

## Amendment

Award Duration ☐ Awarded Amount ☐ Category Budget ☒ Performance Goal ☒

8. Enter the **Amendment Name:** Amendment #X
  - a. If there have been 2 *APPROVED* previous Amendments, current request is #3.
  - b. On the Award, navigate to Post-Award (tab) > Management > Amendments to see any previously created and *APPROVED* Amendments.

9. Enter the **Date Requested:** [Enter today's date.]

Amendment Request

Amendment Name\*

Date Requested\*


10. At anytime, you can click **Save** on the bottom right of your screen to save your progress.

## Amendment Types – Instructions

### Award Duration

11. Enter your new **Requested Length of Award** years and months. After entering in this, the **Requested End Date** and **Requested Close Out Date** will auto-calculate based on what you entered.
12. Edit the **Requested Close Out Date** to be 1 day after the **Requested End Date**.

Requested End Date 6/29/2023


Requested Close Out Date 6/30/2023 

13. **Justification** – [Enter a short summary on why you need a contract extension.]

14. **Upload File(s)** – 2 Attachments:

- a. Letter from the Chief Elected Official including:
  - i. Certification that the local governing body has approved the extension.
  - ii. Identification and reasons for the proposed amendment, including:
    1. Changes to the nature of the proposed requiring the amendment;
    2. Steps implemented to avoid any future amendment requests for the same reasons.
  - iii. Where additional local matching funds are required due to this extension, certification that such funds are available.
- b. Revised implementation schedule showing completion of major milestones for all activities.
- iv. Complete and upload the 'Amendment\_Template\_Milestone' Excel. See the ['Attachments – More Information'](#) section.

15. **Internal Notes** – Internal notes will stay within your organization. Access is not granted to users outside of your organization, including DED.

Award Duration	
Current Length Of Award	2 Years and 1 Month
Current End Date	6/30/2022
Current Close Out Date	12/30/2022
Requested Length Of Award*	<input type="text" value="3"/> years and <input type="text" value="1"/> months
Requested End Date	6/29/2023
Requested Close Out Date	6/30/2023 

## Category Budget

16. Select the Budget **Categories** you wish to Amend. After selecting the category, the **Proposed Budgeted Category Total** field will appear below for you to enter.
- a. You can select more than one budget at once.
  - b. There is also **Add New Category** option, if needed.

17. **Justification** – [Enter a short summary on why you need additional or reduced Grant Funds for the Budget Category(ies).]

18. **Upload File(s)** – 5-6 Attachments:

- a. Current Contract Budget Approved
  - i. PDF copy of your current Budget from AmpliFund. See the ['Attachments – More Information'](#) section.
- b. Proposed Budget After Amendments
  - ii. Complete and upload the 'Amendment\_Template\_Budget\_CDBG' Excel. See the ['Attachments – More Information'](#) section.
- c. Letter from the Chief Elected Official including:

- iii. Certification that the local governing body has approved the budget amendment;
  - iv. Identification and reasons for the proposed budget amendment, including
    - 1. Changes to the nature of the project requiring the amendment;
    - 2. Steps implemented to avoid any future amendment requests for the same reasons.
  - v. If additional local matching funds are required due to this amendment, certification that such funds are available.
  - vi. If the amendment includes a new activity, certification that the activity meets the national objective.
  - d. Minutes from the public hearing held on the proposed amendment (required if reallocating more than 10% of the total original grant amount).
  - e. If the budget amendment will affect major milestones, a revised implementation schedule showing completion of major milestones for all activities. See the ['Attachments – More Information'](#) section.
    - i. Complete and upload the 'Amendment\_Template\_Milestone' Excel.
  - f. Certification of re-evaluation of the environmental assessment (this form is included in the CDBG Administration Manual Chapter 6 – Environmental Review).
19. **Internal Notes** – Internal notes will stay within your organization. Access is not granted to users outside of your organization.

#### Category Budget

Categories

☒ Consultant Fees

☒ Construction

[Add New Category](#)

#### Budget Categories

Category	Proposed Budgeted	Category Total Current Budgeted	Category Total Actuals Total
Consultant Fees	<input type="text" value="\$4,000.00"/>	\$5,000.00	\$1,000.00
Construction	<input type="text" value="\$17,000.00"/>	\$15,000.00	\$5,900.00

## Performance Goal

The Performance Goal Amendment type is used for Beneficiary Amendments and Program Guidelines Amendments. You will not need to use the **Add New Goal** option.

### Beneficiary

20. Select the Beneficiary **Performance Plan Goal** you would like to be amended. After selecting the goal, the **Proposed** new fields will appear below for you to enter.

**NOTE:** You only must amend performance goals to reduce them.

21. **Justification** – [Enter a short summary on why you need edited Beneficiary Goals.]

22. **Upload File(s)** – 2 Attachments:

- a. A letter from the Chief Elected Official including:
  - i. Certification that the local governing body has approved the decrease in proposed accomplishments.
  - ii. Identification and reasons for the proposed amendment; including

1. Changes to the nature of the project requiring the amendment;
  2. Steps implemented to avoid any future amendment requests for the same reasons.
  - iii. If additional local matching funds are required due to this decrease, certification that such funds are available.
  - b. Revised implementation schedule showing completion of major milestones for all activities.
    - i. Complete and upload the 'Amendment\_Template\_Milestone' Excel. See the ['Attachments – More Information'](#) section.
23. **Internal Notes** – Internal notes will stay within your organization. Access is not granted to users outside of your organization.

#### Performance Plan Goal\*

##### Numeric

☒ Example: Numeric

##### Percent Achieved

☐ Example: Percent Achieved

##### Percentage Changed

☐ Example: Percentage Change

Add New Goal

#### Current Performance Goals

##### Example: Numeric:

Numeric

Description on the goal.

##### Current Number to be Achieved

10

##### Proposed Number to be Achieved

8

#### Program Guidelines: Housing

You will need to notify your Program Rep before submitting a 'Program Guidelines: Housing' amendment. They will add it as an option in the Performance Goal section.

24. To submit a Program Guideline Amendment, select the Performance Goal Amendment Type.

25. Select the **Amendment – Program Guidelines: Housing** Goal.

#### Performance Plan Goal\*

##### Numeric

☒ Amendment - Program Guidelines: Housing

26. In the **Proposed Number to be Achieved** field, enter the number of times this specific goal has had an amendment (+1 from **Current Number to be Achieved**).

## Current Performance Goals

Amendment - Program Guidelines: Housing: Current Number to be Achieved  
Numeric 0

Do not add achievements to this goal.

Proposed Number to be Achieved

27. **Justification** – [Enter a short summary on why Program Guidelines need to be changed]

28. **Upload File(s)** – 2-3 Attachments:

- a. Letter from the Chief Elected Official including:
  - i. Certification that the local governing body has approved the amendment to the housing program guidelines;
  - ii. Identification and reasons for the proposed amendment;
  - iii. If additional local matching funds are required due to this amendment, certification that such funds are available.
- b. If the housing program guidelines amendment will affect major milestones, a revised implementation schedule showing completion of major milestones for all activities.
  - i. Complete and upload the 'Amendment\_Template\_Milestone' Excel. See the ['Attachments – More Information'](#) section.
- c. A complete copy of the proposed revised housing program guidelines.

29. **Internal Notes** – Internal notes will stay within your organization. Access is not granted to users outside of your organization.

## Attachments – More Information

### Implementation Schedule

Complete and upload the 'Amendment\_Template\_Milestone' Excel.

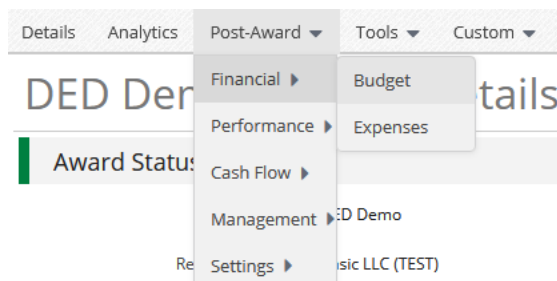
You will need to manually copy this information from your existing Goals to the template: Post-Award (tab) > Performance > Performance Plan > [Click into Goal Names]

Fill in the Contract Number in cell I1.

### Current Budget

Current Budget - PDF copy of your current Budget from AmpliFund.

- a. You will need to export your current Budget:
  - i. Post-Award (tab) > Financial > Budget



- ii. Select **Match** under Options

Budget View Settings

Options

☐ Grant Year ☐ Responsible Individuals ☐ GL Accounts ☒ Match

- iii. Click the **Print icon** in the top right corner.



- iv. Export to a PDF. (Destination: Save as PDF)

Print 1 page

Destination Save as PDF

Pages All

Layout Portrait

More settings

- v. Save, to your computer so you will be able to upload to the Amendment.

Save Cancel

## Budget Template

### Proposed Budget

- a. 'Amendment\_Template\_Budget\_CDBG' Excel (See below for instructions)

### Amendment Budget Template Instructions

The 'Amendment\_Template\_Budget\_CDBG' Excel will show the breakdown of the Grant/Match funds. To do this, you will need to export your current budget, and complete the 'Amendment\_Template\_Budget\_CDBG' Excel (you can use the built in Macro, there is an alternative if you do not want to use the Macro, see the ['Alternative to Running the Macro'](#) section).

### Exporting Current Budget

1. Login to AmpliFund > Grant Management (left navigation) > Grants > [Choose Your Grant] > Post-Award (tab) > Financial > Budget
2. Select the export icon at the top right



- a. Name the file
- b. Choose **excel** as the Export File Type.
- c. Click **Export**.

## Export Budget Allocations

File Name\*

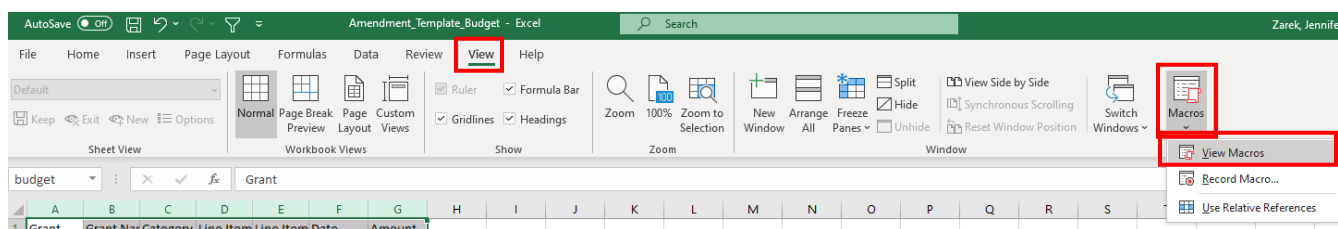
Export File Type\*

3. Open the downloaded excel file.

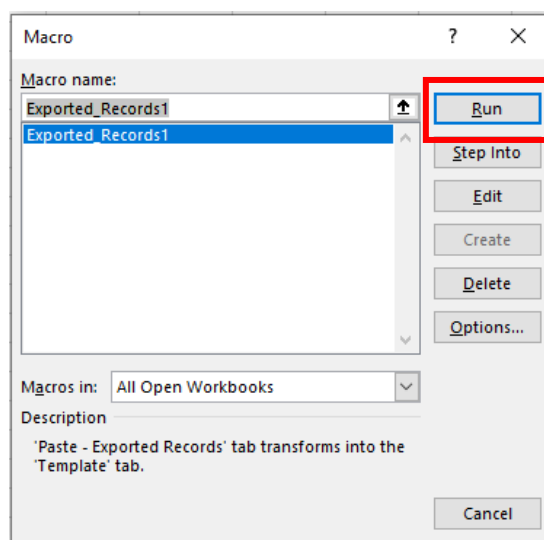
### Running Macro

**NOTE:** Do not edit the file name of the Excel until after you run the Macro.

1. On the exported current budget file, select the columns A:G and **Copy** (Ctrl + C OR Right-click + Copy).
2. Open the 'Amendment\_Template\_Budget\_CDBG' Excel.
3. On the Budget Amendment Template, make sure you are on the 'Paste - Exported Records' tab.
4. Click on cell A1. **Paste** the copied columns on cell A1 (Ctrl + V OR Right-click + Paste). This will now have your exported budget on columns A:G.
5. On the 'Amendment\_Template\_Budget\_CDBG' Excel, select the View ribbon > Macros > View Macros



6. Click Run

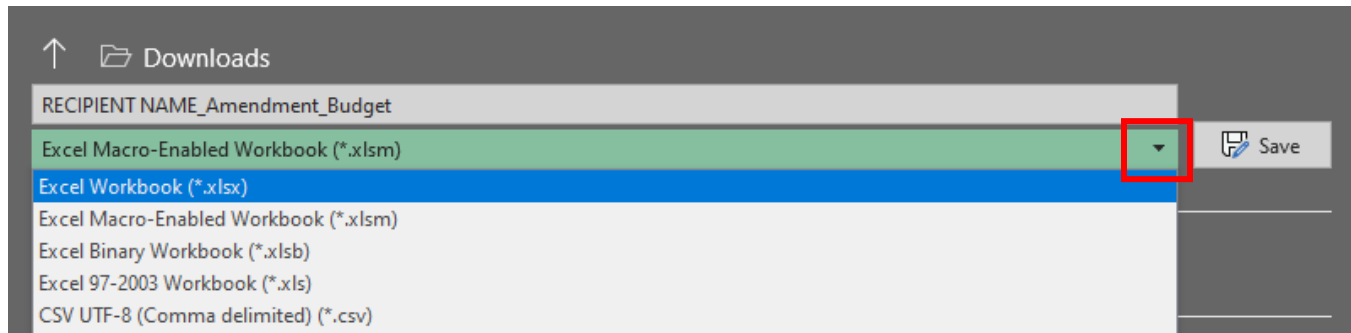


### Completing Spreadsheet

1. Complete the following columns on the 'Template' tab:
  - a. Contract Number
  - b. Updated – Grant Funds
  - c. Updated – Cash Match
  - d. Updated – In-Kind Match



- e. Updated – Local Program Income
- f. Updated – Local CDBG Revolving Loan Funds
2. Complete the following “Current” fields:
  - a. Local Program Income (cell Q4)
  - b. Local CDBG Revolving Loan Funds (cell Q5)
3. Save your file on your computer as a non-macro excel. Use the dropdown arrow to select the correct file type (Supported File types: .xls, .xlsx, .xlt, .xltx).
  - a. Will not have file extension .xslm.



4. Upload the file to the Amendment.

#### Alternative to Running the Macro

If you do not wish to run the Excel Macro, you can manually complete all of columns (A-H) for each line item in the ‘Template – Manual’ tab, cells Q4:Q5, fill in your Contract Number, save the file to your computer (.xlsx file type), and upload to the Amendment.

## Submitting the Amendment

30. When you are done completing the Amendment, click **Submit** on the bottom right of the screen.



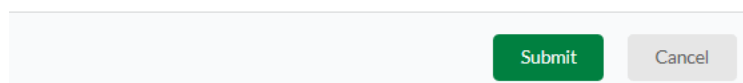
**NOTE:** After submitting, you will not be able to edit your Amendment.

31. Click **Submit** again.

This will notify your DED Program Manager of your Amendment request.

### Submission Reminder

By submitting, you will be sending the amendment to the funder organization.  
You cannot make any further changes after submission.



## Notifications

32. The **Recipient Grant Manager** will receive an email from AmpliFund that the Amendment was successfully submitted.



Hello John Doe,

You are receiving this AmpliFund notification email because **Amendment #2** for DED Demo has been officially submitted to Basic LLC (TEST). → **Recipient Name**

Log in to AmpliFund to [view the amendment](#).

Regards,  
AmpliFund Administrator  
Basic LLC (TEST)

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage every phase of the grant management process.

33. The **Recipient Grant Manager** will receive an email from AmpliFund that a decision has been made after DED reviews the amendment.

**NOTE:** This automatic email has the Amendment Name, but not specific directions on what to do on your specific Amendment Type.



Hello John Doe,

You are receiving this AmpliFund notification email because Basic LLC (TEST) has made a decision regarding your amendment request for DED Demo. → **Recipient Name**  
→ **Award Name**

**Amendment Name** **Amendment #2**

- This may affect line items on the budget. Go to the budget page to make any necessary changes.
- Award Duration Approved
- This may affect line items on the budget. Go to the budget page to make any necessary changes.
- This may affect performance goals on the performance plan. Go to the performance plan page to make any necessary changes.

For more detail, log in to AmpliFund to [view the amendment](#).

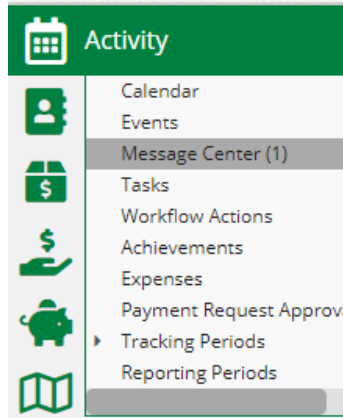
Regards,  
AmpliFund Administrator  
Basic LLC (TEST)

AmpliFund is the leading enterprise grant management platform designed for nonprofit and public sector organizations to manage every phase of the grant management process.

34. The Recipient Grant Manager will also receive these messages in AmpliFund's **Message Center**.

35. To view the Message Center: Login into AmpliFund > Activity (left navigation) > Message Center > [click Subject name]

**NOTE:** The number in parenthesis doesn't go away unless the Message is deleted in the message center. To delete, click the Subject name then the trash icon in the top right corner.



Clicking on the **View the amendment** link will take you to the outstanding amendment.

## Viewing the Amendment Response

36. Login to AmpliFund > Grant Management > Grants > [Choose Your Grant] > Post-Award (tab) > Management > Amendments

37. View the amendment one of two ways:

- To see the short summary popup, click the **Amendment Name**.
- To see the complete amendment, click the **Magnifying Glass**.

Amendment #2



Click to See  
Summary Popup



Click to Entire  
Amendment Response

## Summary Popup

### Amendment #2

Amendment Type	Date Created	Date Submitted	Amendment Creator Type	Submitted By	Internal Notes	Status	Response Sent
Award Duration	3/12/2021	3/12/2021	Recipient	John Doe		Approved	Yes

Close

## Entire Amendment Response

### Amendment Request Response

Status

Approved Length Of Award  years and  months

Approved End Date 9/8/2023

Approved Close Out Date 3/8/2024

Reasoning

Approved, justification and documentation is acceptable.

38. Under the Reasoning field, there may be an **Existing Attachments** to download.

## Possible Statuses

**NOTE:** For Amendment Requests that have multiple Amendment Types, it is possible to have one 'Approved' and another one 'Denied'.

### Approved

39. Your AmpliFund Award will be updated and your signed contract will be in your Documents folder (if applicable).

**NOTE:** It is possible to have your Amendment Request 'Approved' but not exactly what was requested.

### Denied

40. Nothing further occurs.

### Denied: Needs More Information

41. You will need to submit a new Amendment with the changes the Program Manager asked for in their Reasoning field if you wish to continue with the Amendment.